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Message Text

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ACTION EA-12

INFO OCT-01 ISO-00 EB-08 /021 W
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R 220251Z AUG 78
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TO USDA/FAS WASHDC
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UNCLAS SECTION 1 OF 3 HONG KONG 11484

TOFAS 201
FROM AG OFFICER
REPORT NO. HK-8041; CODE 11AL

E.O. 11652: N/A
TAGS: EAGR
SUBJECT: PRC SUMMER GRAIN HARVEST

REF HK-8032 (TOFAS 172)

1. ESTIMATES HK-8032 TENTATIVE. MORE INFORMATION AND CLAIMS NOW AVAILABLE WHICH WE BELIEVE SUPPORT THESE ESTIMATES ALTHOUGH STILL TOO EARLY TO MAKE FIRM ESTIMATE AND BREAKDOWN OF PRC SUMMER HARVESTED GRAIN OUTTURN.

2. MOST DEFINITIVE NATIONAL CLAIMS TO DATE INCLUDE:
(A) CHAIRMAN HUA STATED "...QUITE A NUMBER OF LOCALITIES HIT BY SEVERAL NATURAL CALAMITIES, BUT SUMMER HARVESTED CROPS YIELDED OVER 5.0 M.M.T. MORE (GRAIN) THAN LAST YEAR", (NCNA, ENGLISH, 7/11/78).
(B) LONG DROUGHT, BUT HARVESTED 5.0 M.M.T. MORE SUMMER GRAIN THIS YEAR THAN LAST... SAME TOTAL AREA OF CROP FIELDS SUFFERED DROUGHT THIS YEAR AS LAST, BUT DROUGHT LONGER THIS YEAR DOING MORE DAMAGE TO SUMMER CROPS...WORST HIT WERE THE YELLOW AND HUAI RIVER VALLEYS (NCNA, ENGLISH, 7/15/78).
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(C) SUMMER GRAIN SHOWED A MORE THAN 10 PERCENT INCREASE OVER LAST YEAR... SERIOUS DROUGHT IN MANY PLACES CAUSED A REDUCTION IN THE HARVEST...HARVEST FELL SHORT OF THE STATE PRODUCTION PLAN FOR SUMMER GRAINS (PEOPLE'S DAILY, 7/21/78).
(D) ALL OUT EFFORTNAO WIN GOOD AUTUMN HARVEST FOLLOWING A 10 PERCENT INCREASE IN SUMMER GRAINS...AUTUMN GRAINS USUALLY CONSTITUTE TWO-THIRDS OF CHINA'S TOTAL ANNUAL GRAIN PRODUCTION

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(NANA, ENGLISH, 7/22/78).
(E) PRODUCTION OF SUMMER HARVESTED WHEAT AND BARLEY, WHICH ACCOUNTS FOR NEARLY ONE-FIFTH OF CHINA'S TOTAL GRAIN, WAS 5.0 M.M.T. MORE THAN LAST YEAR (NCNA, ENGLISH, 7/27/78).
(F) INCREASE IN SUMMER GRAIN OUTTURN EXCEEDED 10 PERCENT... OF THE 24 SUMMER GRAIN PRODUCING PROVINCES, AUTONOMOUS REGIONS AND MUNICIPALITIES, 20 ACHIEVED INCREASES...SZECHWAN, KWEICHOW, YUNNAN, HUPEH, KWANGTUNG, KIANGSU, FUKIEN, PEKING, TIENSIN AND HOPEH GATHERED ALL-TIME HIGH HARVESTS OF SUMMER GRAINS; SHANSI AND SHENSI SUFFERED A LOSS; 2 OTHERS (NOT IDENTIFIED) EQUALLED LAST YEAR'S LEVEL...SUSTAINED DROUGHT IN MAJOR WINTER WHEAT PROVINCES... WORST HIT WERE THE HAI, YELLOW AND HUAI RIVER VALLEYS...MORE THAN ONE-THIRD OF THE SUMMER HARVESTED GRAIN AREA WAS SEVERELY AFFECTED (PEOPLE'S DAILY, 7/2/78).

3. WE CONCLUDE FROM THESE STATEMENTS THAT (A) GROWING CONDITIONS IN THE MAJOR WINTER WHEAT AREAS (HAI, YELLOW AND HUAI RIVER VALLEYS) WERE LITTLE IMPROVED OVER THE POOR CONDITIONS LAST YEAR; (B) MOST OF THE CLAIMED 5.0 M.M.T. INCREASE IN SUMMER GRAINS OCCURRED IN THE YANGTZE VALLEY WHERE PEAS, BEANS, BARLEY, AND POTATOES, RATHER THAN WHEAT, ARE THE DOMINANT WINTER (SPRING AND SUMMER HARVESTED) CROPS; AND (C) THAT THE OUTTURN OF ALL SUMMER HARVESTED GRAINS WAS IN THE NEIGHBORHOOD OF 55.0 M.M.T. THE CLAIM THAT "SUMMAR HARVESTED WHEAT AND BARLEY, WHICH ACCOUNTS FOR NEARLY ONE-FIFTH OF CHINA'S TOTAL GRAINS, WAS 5.0 M.M.T. MORE THAN LAST YEAR" IS NOT CONSISTENT WITH THE MORE AUTHORITATIVE CLAIMS THAT THE INCREASE
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WAS COMPRISED OF ALL SUMMER HARVESTED GRAINS, NOT JUST WHEAT AND BARLEY, OR PAST REPORTS THAT SUMMER HARVESTED GRAINS NORMALLY CONSTITUTE ABOUT ONE-FIFTH OF CHINA'S TOTAL OUTTURN OF GRAIN (NCNA, ENGLISH, 6/22/75). OF THE TEN PROVINCES AND MUNICIPALITIES REPORTING "ALL TIME HIGH HARVESTS OF SUMMER GRAINS," ONLY FOUR, SZECHWAN, HUPEH, KIANGSU, AND HUPEH, ARE LARGE PRODUCERS OF WINTER WHEAT. CLAIMS OF A RECORD HARVEST IN KWANGTUNG 1 AND FUKIEN ARE NOT CONSISTENT WITH EITHER PROVINCIAL REPORTS OR WEATHER DATA.
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UNCLAS SECTION 2 OF 3 HONG KONG 11484

TOFAS 201
FROM AG OFFICER
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E.O. 11652: N/A
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4. AS SHOWN IN THE FOLLOWING TABLE OF PROVINCIAL CLAIMS TO DATE, MORE PROVINCES IN WHICH GRAINS OTHER THAN WINTER WHEAT ARE THE DOMINANT CROP CLAIMED HIGHER PERCENTAGE INCREASESOVER 1977. THE OUTTURN IN ANHWEI AND KIANGSU IS NORMALLY SPLIT EQUALLY BETWEEN WINTER BXCUAXINE OTHER SUMMER HARVESTED GRAINS. REPORTS FROM BOTH PROVINCES CLEARLY INDICATE THAT THE OUTTURN OF OTHER GRAINS INCREASED MUCH MORE THAN DID THE OUTTURN OF WHEAT.

WINTER WHEAT THE DOMINANT CROP

(1) HOPEH---RECORD SUMMER GRAIN HARVEST, OUTTURN 20 PERCENT OVER 1977 (SHIH-CHIA-CHUANG, 7/15/78).
(2) PEKING---NO LOCAL CLAIM; ALL-TIME HIGH HARVEST (PEOPLE'S DAILY, 7/21/78).
(3) TIENTSIN---YIELD AND OUTTURN OF SUMMER HARVESTED GRAIN HIGHEST IN HISTORY, 90 PERCENT OF THE ACREAGE

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IS WINTER WHEAT (TIENTSIN, 7/17/78).
(4) HONAN---GOOD WHEAT HARVEST, PRODUCTION PLUS 10 PERCENT OVER 1977 (CHENG-CHOW, 7/19/78).
(5) SHANTUNG---WHEAT PRODUCTION PLUS 7 PERCENT OVER 1977 (NCNA, 7/19/78); FAIRLY GOOD WHEAT HARVEST (CHI-NAN, 7/26/78).
(6) SINKIANG---WINTER WHEAT, SPRING WHEAT AND BARLEY PLUS 15 PERCENT OVER 1977 (URUMCHI, 8/6/78).
(7) SHENSI---NO PROVINCIAL CLAIM; LOSS IN SUMMER GRAIN PRODUCTION (NCNA, 8/2/78).
(8) SHANSI---NO PROVINCIAL CLAIM; LOSS IN SUMMER GRAIN PRODUCTION (NCNA, 8/2/78).

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(9) KANSU---LOSSES IN SUMMER HARVESTED GRAIN (LAN-CHOW, 6/8/78).
BOTH WINTER WHEAT AND OTHER SUMMER HARVESTED
GRAINS ARE IMPORTANT
(1) ANHWEI---WHEAT PRODUCTION INCREASED OVER 1977, WAS BETTER
THAN ESTIMATED (6/17/78); RELATIVELY GOOD SUMMER
HARCEST; YIELD AND PRODUCTION OF WHEAT AND
OTHER SUMMER HARVESTED GRAINS ON OVER 1.8
MILLION HECTARES WAS OVER 20 PERCENT ABOVE
1977 (NCNA, 7/10/78).
(2) KIANGSU---WHEAT PRODUCTION PLUS 10 PERCENT ABOVE 1976, ALSO
A GOOD YEAR (NAN-CHING, 7/2/78); SUMMER HARVESTED
GRAIN PRODUCTION PLUS 7 PERCENT ABOVE 1976 RECORD
(NCNA, 7/4/78). NO COMPARISON BETWEEN 1978 AND 1977
AVAILABLE.
(3) SHANGHAI---YIELD PER HECTARE OF SUMMER HARVESTED GRAIN
AVERAGED 3,255 KILOGRAMS, APPROACHING THE RECORD
SET IN 1974 (SHANGHAI, 7/13/78).
(4) HUPEH---SUMMER HARVESTED GRAIN PRODUCTION PLUS 20 PERCENT
ABOVE 1977 (NCNA, 7/7/78).
(5) SZECHWAN---SUMMER HARVESTED CROPS, MAINLY WHEAT,
PLUS 10 PERCENT ABOVE 1977 RECORD (NCNA, 7/6/78).
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SUMMER HARVESTED GRAINS OTHER THAN WHEAT PREDOMINATE
(1) HUNAN---PREDICT SUMMER HARVESTED GRAIN WILL BE PLUS ABOUT
10 PERCENT OVER 1977 (CHANG-SHA, 6/13/78).
(2) CHEKIANG---GOOD HARVEST OF WHEAT, BARLEY, BEANS, AND
POTATOES; SUMMER HARVESTED GRAIN YIELD WAS PLUS
70 PERCENT ABOVE 1977 AND PRODUCTION WAS PLUS
100 PERCENT ABOVE 1977 (HANG-CHOU, 6/13/78).
(3) KIANGSI---BUMPER SUMMER HARVEST, WHEAT PRODUCTION PLUS
10 PERCENT OVER 1977 (NAN-CHANG, 5/18/78).
(4) FUKIEN---BUMPER HARVEST OF WHEAT AND BARLEY (FU-CHOU, 6/11/78)
.
(5) KWANGTUNG---WINTER SWEET POTATOES PRODUCTION PLUS 35.4
PERCENT OVER 1977 (CANTON, 5/3/78); FAILED TO FULFILL
ORIGINAL PLAN TO INCREASE SUMMER HARVEST (CANTON,
7/3/78).
(6) KWANGSI---NO REPORT.
(7) KWEICHOW---ESTIMATE SUMMER HAVESTED GRAIN WILL BE
14.7 PERCENT OVER 1977 AND PLUS 6.3 PERCENT ABOVE
1976 RECORD (KUEI-YANG, 7/3/78).
(8) YUNNAN---SUMMER HARVESTED GRAIN PLUS 150,000 M.T., OR
PLUS 12.9 PERCENT ABOVE 1977 (KUN-MING, 7/4/78).
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UNCLAS SECTION 3 OF 3 HONG KONG 11484

TOFAS 201
FROM AG OFFICER
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E.O. 11652: N/A
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5. THE SPRING DROUGHT OF 1977 WAS THE MOST SEVERE SINCE LIBERATION, BUT SOME RAIN OCCURRED OVER PARTS OF THE MAJOR WINTER WHEAT REGION IN LATE APRIL AND MAY. CROPS IN PARTS OF THE YANGTZE VALLEY WERE SET BACK BY HEAVY SPRING RAINFALL; SOUTH CHINA, KWANGTUNG, FUKIN, AND KWANGSI, HAD A VERY GOOD SUMMER HARVEST AS DID KIANGSI AND SZECHWAN. THE DROUGHT IN THE MAJOR WINTER WHEAT REGION THIS YEAR WAS LONGER AND CROP DAMAGE WAS ADMITTEDLY GREATER. WEATHER CONDITIONS WERE MUCH IMPROVED THIS YEAR OVER MOST OF THE YANGTZE VALLEY; IN THIS REGION THE GREATER PORTION OF THE SUMMER GRAIN HARVEST IS COMPRISED OF MISCELLANEOUS GRAINS AND POTATOES. THE SUMMER HARVEST WAS NOT AS GOOD AS LAST YEAR IN SOUTH CHINA, BUT JUDGING FROM PAST PRACTICES AND THE KWANGTUNG REPORT THAT WINTER SWEET POTATOES OUTTURN WAS UP SUBSTANTIALLY, IT WOULD APPEAR THAT POTATOES AND OTHER MISCELLANEOUS GRAINS FARED BETTER THAN WHEAT.

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6. THE APPROXIMATE 5.0 M.M.T. INCREASE REPORTED FOR SUMMER HARVESTED GRAINS IS PLAUSIBLE AS IS THE CLAIM OF A "MORE THAN 10 PERCENT INCREASE", ESPECIALLY SINCE THE LATTER IS AGAINST THE LOW 1977 BASE. WE TENTATIVELY ESTIMATE THE SUMMER GRAIN HARVEST FOR

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1976, 1977, AND 1978 AS FOLLOWS IN MILLIONS OF METRIC TONS
(PREVIOUS ESTIMATES IN PARENTHESIS):

	1976	1977	1978
WINTER WHEAT	44.0	38.0 (37.0)	39.5 (39.0)
MISC. GRAIN & POTATOES	14.0	12.0 (10.0)	15.5 (13.0)
TOTAL SUMMER HARVESTED GRAINS	58.0	50.0 (47.0)	55.0 (52.0)

7. TENTATIVE ESTIMATES OF INCREASES AND DECREASES IN WINTER WHEAT OUTTURN BY PROVINCE OR REGION IS AS FOLLOWS (THOUSAND METRIC TONS):

INCREASE IN WHEAT OUTTURN	
HOPEH	400.0 2/
SHANTUNG	350.0
HONAN	370.0
KIANGSU	650.0 3/
ANHWEI	170.0
HUPEH	50.0
SZECHWAN	125.0
OTHER	200.0
TOTAL INCREASE	2,315.0

DECREASES IN WHEAT OUTTURN	
SHANSI	200.0
SHENSI	450.0 4/
OTHER	150.0
TOTAL DECREASE	800.0
NET INCREASE	1,515.0

8. WE DO NOT BELIEVE 39.5 M.M.T. WINTER WHEAT FIGURE INCLUDES BARLEY. HIGH LEVEL CHINESE OFFICIAL STATED THAT CHINA PRODUCED
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45.0 M.M.T. OF WHEAT (WINTER AND SPRING) IN 1975 AND THAT OUTTURN INCREASED 5.0 M.M.T. IN 1976. STRONG ARGUMENT CAN BE MADE THAT CLAIMS EXCLUDE BARLEY, BUT EQUALLY STRONG ARGUMENT CAN BE MADE THAT CLAIMS INCLUDE "SAN MAI". WE ASSUME CHINESE WHEAT CLAIMS DO NOT INCLUDE "SAN MAI", BUT WE ARE CURRENTLY RE-EVALUATING WHEAT ACREAGE, YIELD, AND OUTTURN SERIES IN HOPE THAT CLAIMS CAN BE CLARIFIED.

1/ KWANGTUNG REPORTED THE OUTTURN OF WINTER SWEET POTATOES INCREASED BY 35.4 PERCENT OVER 1977 (CANTON, 5/3/78), BUT THAT THE PROVINCE FAILED TO FULFILL THE PLAN TO INCREASE THE HARVEST OF EITHER SRPING GRAIN OR EARLY RICE.

2/ THE SUMMER HARVEST IS COMPARISED OF ABOUT 90 PERCENT WINTER WHEAT AND 10 PERCENT MISCELLANEOUS GRAINS. THE PROVINCE IS NOT A HIGH YIELDING AREA AND OUTTURN WAS POOR LAST YEAR; THUS, THE CLAIM OF A 20 PERCENT INCREASE IN SUMMER HARVESTED GRAINS IS AGAINST A LOW BASE.

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3/ KIANGSU ALONE CLAIMED AN 2.5 M.M.T. INCREASE IN SUMMER HARVESTED GRAINS, BOUT ONE-HALF OF THE INCREASED CLAIM FOR ALL OF CHINA. THE ACREAGE OF SUMMER HARVESTED GRAINSHAS REMAINED RATHER STABLE FOR SEVERAL YEARS AND IS NORMALLY ABOUT EVENLY DIVIDED BETWEEN WHEAT AND ALL OTHER GRAINS. MOST OF THE WHEAT GROWING IN THE PROVINCE IS CONCENTRATED IN THE REGION NORTH OF THE HUAI RIVER WHERE GROWING CONDITIONS ADMITTEDLY WERE NOT NEARLY AS FAVORABLE AS IN OTHER PARTS OF THE PROVINCE. WE ESTIMATE THAT WHEAT COMPARISED ABOUT ONE-FOURTH OF PROVINCE'S TOTAL INCREASE IN SUMMER HARVESTED GRAIN.

4/ A RECENT HONG KONG RADIO REPORT STATED THE DECLINE IN WHEAT PRODUCTION AMOUNTED TO 30 PERCENT. THIS COULD INDICATE A DECREASE OF AS MUCH AS 700,000 M.T.
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